Migrant Labour in the Hertfordshire Local Enterprise Partnership Area

Section 1 – Purpose and Uses

Commissioned by the East of England Strategic Migration Partnership in February 2012, this report aims to assist colleges, universities, the local enterprise partnership (LEP) and others to:

- Understand the scale and types of both EU and Non-European Economic Area (EEA) migrants securing employment in the locality;
- Identify industries and occupations likely to be most affected by forthcoming changes in immigration policy;
- Assess the adequacy of existing local learning provision and shape the future curriculum offers in order to meet the needs of an economy with less access to foreign workers from outside the EEA in the future.

The data on economic migrants used in this report is primarily drawn from two sources:

- Data on Non-EEA migrants entering the UK under Certificates of Sponsorship during a 40 month period between November 2008 and February 2012 has been provided by the United Kingdom Border Agency. This data provides details of Certificates of Sponsorship used by companies when recruiting Non-EEA migrant workers. The data provides an insight into both the industries and occupations using migrant labour.
- Data on migrants from the so-called A8 Accession States of the European Union which joined the EU in 2004. This data provides details of A8 nationals granted permits to work in the UK under the Worker Registration Scheme operated by the United Kingdom Border Agency. The data also provides details of industries and occupations in which migrant workers have been employed[1].

It should be noted that the majority of the occupation and industry/sector estimates provided in this report relate to a one year period and therefore reflect the flow of new migrant

Assessing migrant labour reliance in Local Enterprise Partnerships across the East of England

workers into the area. The stock of migrant workers in the area will be significantly larger than these estimates as they will reflect an accumulation of migrants over time.

Section 2 – Policy Context

The Coalition Agreement committed the government to introducing an annual limit on the number of Non-EU economic migrants admitted into the UK. The immigration cap for Non-EEA workers for the year from April 2011 is 21,700 - about 6,300 lower than in 2009. Of those, 20,700 are tier two skilled migrants entering graduate occupations with a job offer and sponsorship. The other 1,000 are people allowed in under a new "exceptional talent" route – such as scientists, academics and artists. The former tier one general route - open to highly skilled migrants without a job offer will be closed. However, these limits do not apply to a category of workers who come to the UK in an "intra-company transfer" with their multinational employer.

The Coalition also asked the Migration Advisory Committee to undertake a full review of jobs and occupations skilled to Level 4 (degree level) and above to inform the Tier 2 shortage occupational list, where there would be a justification to fill roles using labour from outside the European Economic Area. This work was completed in February 2012.

Together these changes in policy will, unless appropriate action is taken, have a significant impact upon areas and industries which have become reliant on Non-EEA migrant labour to bridge key labour and skills shortages.

Section 3 – Economic Summary of the Hertfordshire LEP Area

The Hertfordshire LEP area is home to a population of around 1.1m people of which approximately 714,900 are of working age. Amongst those that are working age, there is a 79.3% economic activity rate across the area, which is 3.1% higher than is seen across the UK. The unemployment rate is 6.4%, encouragingly lower than the 7.7% average for England.

Just under three-quarters (71%) of the Hertfordshire population is qualified to NVQ2 and

[1]The Worker Registration Scheme was a temporary measure used between 2004 and April 2011 to monitor incoming workers from eight new member states of the European Union (the so called "A8 countries"). The A8 countries that joined the European Union in 2004 were: the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia.

above, with 55.1% qualified to NVQ3 and above. 36.2% are qualified to NVQ4 and above. The proportion of the population possessing qualifications at NVQ3 and above is slightly higher than the national average.

The area has a business base of approximately 47, 400 companies, making up 23.4% of the East England economy and 2% of the economy of the UK as a whole. Its main economic strengths reside in rural businesses – especially from smaller companies. However, development and growth is constrained because small rural companies are often seen as a lesser priority to larger, urban businesses; and urban-rural public transport is under funded despite its potential. Due to the strength of Hertfordshire's rural area, tourism, leisure and voluntary/community sectors are seen as those with the most potential for economic growth.

The Hertfordshire Recession Task Force was set up in December 2008. It put forward the Recession Pledge to provide framework for local activities aimed at providing support and lessening the impact of the recession. It works with the Hertfordshire Forward, a countywide local strategic partnership which brings together all the key agencies in the county to improve the quality of life and wellbeing of Hertfordshire residents.

Section 4 – Migrant Worker Volumes

Between November 2008 and February 2012 approximately 4,467 Non-EEA migrant workers were employed in the Hertfordshire LEP area. This represents an annual average of 1,340. As a percentage of the workforce, Non-EEA migrant workers represent approximately 0.23% of the total economically active population in the area.

Between April 2010 and March 2011, a total of 1,725 A8 EU migrants were employed in companies based across the Hertfordshire LEP

area. As a percentage of the workforce, the A8 EU migrant workers represent approximately 0.3% of the total economically active population in the area.

Therefore, Non-EEA and A8 EU migrant workers represent 0.53% of the economically active population. In comparison with other LEPs in the Greater East region[2], Hertfordshire has the second lowest economic activity rate of Non-EEA and A8 EU migrants. Across the East of England region as a whole, Non-EEA and A8 EU migrant workers represent 0.66% of the economically active population.

Whilst the two data sources used to estimate Non-EEA and A8 EU migrant volumes provide a useful picture of inward migration into the area, they can only provide a partial insight as they do not capture data on all migrants entering the area from other EU nations not covered by the Worker Registration Scheme requirements or those arriving as asylum seekers who are then given leave to remain or UK nationals returning home after a period overseas.

Data constructed by the Office of National Statistics using administrative sources, such as registrations for National Insurance Numbers, higher education student enrolments and registrations at GP surgeries provides perhaps the most comprehensive estimate of the total inward migration to the area. Using this source, an estimated 35,300 migrants of all ages entered the Hertfordshire LEP area between mid-2006 and mid-2010. This equates to an annual average of 8,800 migrants of all ages entering the area every year.

As can be seen in Chart 1 only approximately half of the 8,800 estimated annual migrants come to work in the area, with large proportions also studying or returning to the UK from periods abroad.

Chart 1: Estimated Composition of Migrants Entering the Hertfordshire LEP Area

■ Workers ■ Students ■ Returning Migrants (UK born)
■ Asylum Seekers ■ Others
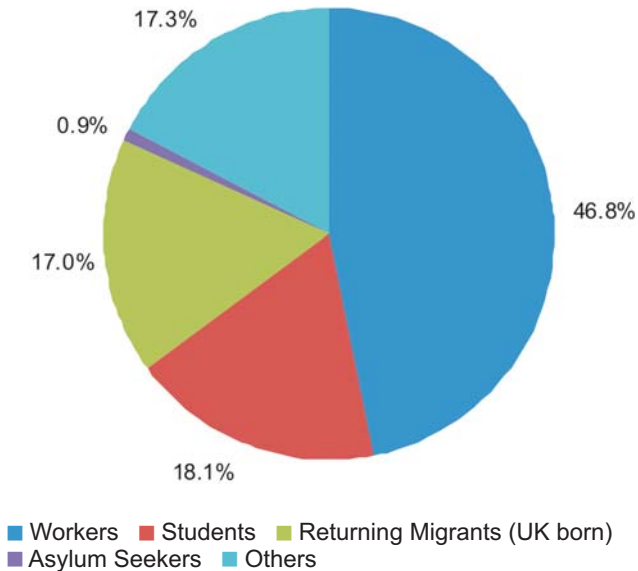
Source: Immigration Estimates to Local Authority Office of National Statistics.

However, some Local Authorities within the Hertfordshire LEP area have significant differences in their migrant composition than is shown in Chart 1. The districts that have a much higher than average proportion of migrant workers are Watford (60.8% workers), Broxbourne (57.7% workers) and Stevenage (55.8% workers). These districts typically saw

lower levels of other categories of migrants, especially retuning migrants, in comparison to the LEP area as a whole.

The 18.1% student migrant composition of the Hertfordshire LEP area is heavily bulked up by Welwyn Hatfield (44.8% students), Dacorum (18.1% students) and Stevenage (11.8% students). The average student composition of the remaining seven Local Authorities is only 7.3%. The three districts with a high share of student migrants typically saw lower proportions of workers and returning migrants to compensate.

Section 5 – Occupational Patterns

Across the Hertfordshire LEP area, Non-EEA migrant workers have been employed in approximately 140 different SOC[3] code areas since November 2008. A8 EU migrant workers have, in comparison, been employed in just under 70 different SOC code areas.

While migrants have been employed in a wide range of occupations, a much smaller number of occupations account for the vast majority of all migrant roles (circa 77% for Non-EEA migrants and 81% for A8 migrants). Table 1 provides details of the top 15 occupations filled by Non-EEA and A8 migrant workers.

Table 1

Most popular occupations currently filled by Non-EEA and A8 EU migrants

Rank	Non-EEA Occupations	No. of Migrants	Rank	A8 EU Occupations	No. of Migrants
1	IT/Software Professionals	1324	1	Warehouse Operative	376
2	Youth & Community Workers	551	2	Process Operative (Other Factory Worker)	267
3	Medical Practitioners e.g. Doctors & Surgeons	278	3	Cleaner/Domestic Staff	223
4	Actors/Entertainers	277	4	Sales & Retail Assistants	121
5	Nurses	134	5	Kitchen & Catering Assistants	92
6	Chefs/Cooks	124	6	Waiter/Waitress	59
7	Clergy	118	7	Packer	41
8	Managers, Information & Communication Technology	96	8	Bar Staff	34
9	Researchers, Scientific	95	9	Maid/Room Attendant (Hotel)	33
10	IT Strategy & Planning Professionals	86	10	Chef, Head	30
11	Managers, Marketing & Sales	79	11	Driver, Delivery Van	30
12	Managers, Customer Care	78	12	Farm Worker/Farm Hand	28
13	Care Assistants & Home Carers	77	13	Carpenter/Joiner	26
14	Musicians	64	14	Care Assistants/Home Carers	21
15	Teacher, Secondary Education	54	15	Labourer, Building	14

Sources: Worker Registration Scheme, DWP and Certificates of Sponsorship, UKBA

IT/Software Professionals is the largest single occupational group of Non-EEA migrant workers recruited in the area, employing 30% of all employed Non-EEA migrant workers in the Hertfordshire LEP area. A further 12% of all migrant workers are employed as Youth and Community Workers and 6% as Medical Practitioners. Chart 2 below demonstrates the proportion of Non-EEA migrants in the top 5 most popular occupations.

Chart 2: Top 5 Occupations Currently Filled by Non-EEA Migrant Workers

- IT/Software Professional ■ Youth and Community Workers
- Medical Practitioners e.g. Doctors and Surgeons
- Actors/Entertainers ■ Nurses ■ Other
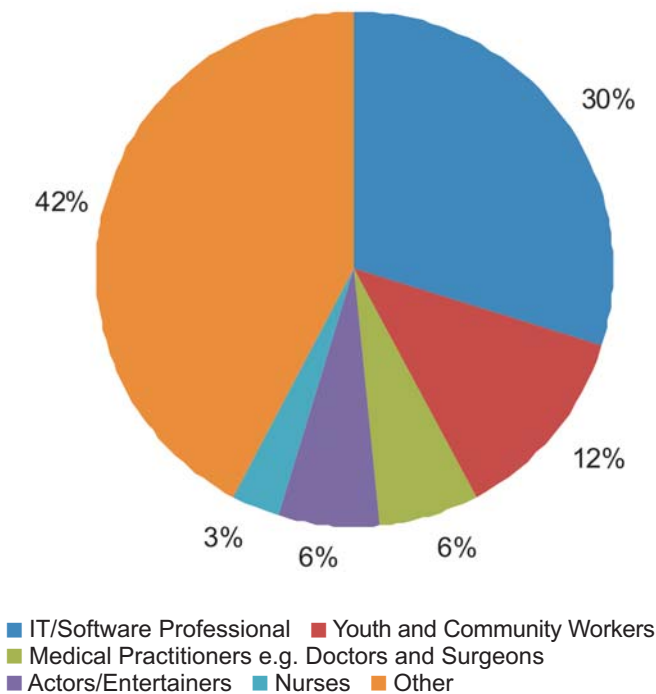
Warehouse Operative was the occupation most commonly filled by A8 EU migrants, with 22% of migrant workers undertaking these roles between April 2010 and March 2011. A8 migrants also took Process Operative (other factory worker) roles (15%); Cleaner, domestic staff roles (13%); and Sales and Retail Assistants roles (7%). 38% of A8 EU migrant workers are employed in other roles, as shown in Chart 3 to the right.

Chart 3: Top 5 Occupations Currently Filled by A8 EU Migrant Workers

- Warehouse Operative
- Process Operative (Other Factory Worker)
- Cleaner/Domestic Staff ■ Sales and Retail Assistants
- Kitchen and Catering Assistants ■ Other
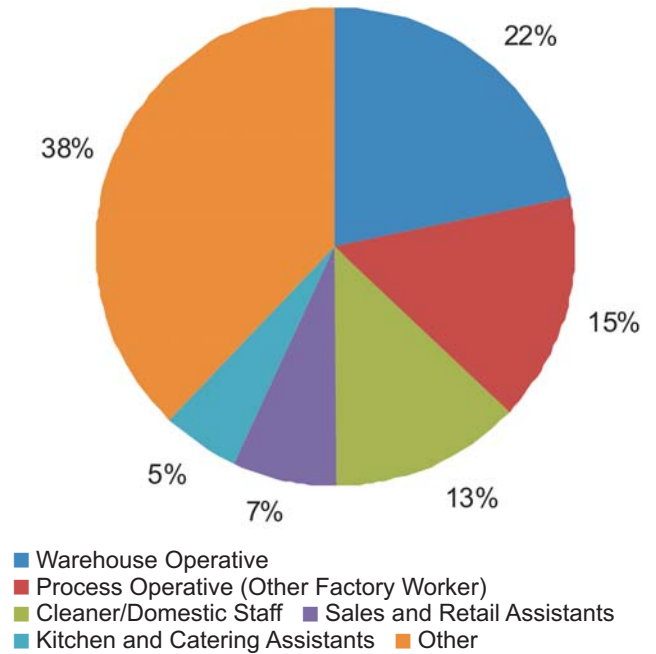
The data presented in Table 1 clearly shows that significant difference in the occupational make-up of migrants from Non-EEA nations and those from A8 EU countries. Non-EEA tend to be employed in higher order occupations requiring high levels of skills and qualifications. A8 EU nations are concentrated in occupations towards the lower half of the occupational spectrum requiring on low intermediate level skills.

Section 6 – Sectoral Patterns

Migrant workers have been employed by companies working in a very wide range of industries operating in the area, from civil engineering to publishing and from food and drink manufacturing to IT services. However, as with occupations, a much smaller list of industries accounts for the vast majority of both Non-EEA and A8 EU migrant workers.

The 10 most common Non-EEA migrant worker industries account for 86% (circa 3,900 employees) of all Non-EEA migrants employed in the Hertfordshire LEP area between November 2008 and February 2012. The 10 most common A8 migrant worker industries accounts for almost all 1,700 employees of all A8 migrant workers employed in the LEP area between April 2010 and March 2011.

Table 2

The top 10 industries using Non-EEA and A8 EU migrants

Rank	Non-EEA Industries	% of Migrants	Rank	A8 EU Industries	% of Migrants
1	Computer Programming, Consultancy & Related Activities	35%	1	Administration, Business & Managerial Services	47%
2	Other Personal Service Activities	16%	2	Hospitality & Catering	16%
3	Human Health Activities	12%	3	Retail & Related Services	10%
4	Creative, Arts & Entertainment Activities	8%	4	Manufacturing	6%
5	Education	5%	5	Agriculture Activities	5%
6	Accommodation	3%	6	Health & Medical Services	5%
7	Food & Beverage Service Activities	2%	7	Transport	4%
8	Sports Activities, Amusement & Recreation Activities	2%	8	SBS Sectors	3%
9	Other Professional, Scientific & Technical Activities	2%	9	Construction & Land Services	3%
10	Information Service Activities	2%	10	Entertainment & Leisure Services	2%

Sources: Worker Registration Scheme, DWP and Certificates of Sponsorship, UKBA

The data suggests that the largest employing industry of Non-EEA migrant workers is the Computer Programming, Consultancy and Related Activities. This refers to range of services including software development, leisure and entertainment programming and computer facilities management.

The Human Health Activities industry accounts for 12% of all Non-EEA migrants (circa 500 workers), followed by Creative, Arts and Entertainment Activities with 8% of all Non-EEA migrant workers (circa 350 workers).

Human Health Activities is an industry that covers functions including hospital activities, general medical practice, specialist medical practice and dental medical practice. The Creative, Arts and Entertainment Activities industry refers to a range of activities including performing arts, artistic creation and operation of arts facilities.

The data suggests that the largest employing industry of A8 migrant workers in the Hertfordshire LEP area is Administration, Business & Managerial Services. However, it should be noted that high volumes of migrant workers choose to use the services of recruitment agencies when finding work and it is likely that in a number of cases these recruitment companies have wrongly been identified as the direct employers of migrant workers using them rather than the actual industry in which the migrant worker is working.

The Hospitality & Catering industry accounts for 16% of all A8 EU workers operating in the Hertfordshire LEP area. Retail & Related Services was also an important sector with around 10% of workers employed within it.

Section 7 – Geographic Patterns

Using the postcodes from all companies employing Non-EEA migrant workers and the resident Local Authority of A8 EU migrant workers, it has been possible to map the distribution of both groups across the Hertfordshire LEP area.

As can be seen from Map 1, all Local Authorities have witnessed some degree of inward Non-EEA migration. Those with the greatest number of

Non-EEA migrant workers are identified as: Dacorum (1678), St Albans (958), Watford (531), Hertsmere (489) and Broxbourne (448). The Three Rivers district and the North Hertfordshire district have witnessed the lowest level of Non-EEA migration with both authorities gaining 114 Non-EEA migrants during the period November 2008 – March 2012.

Map1: Number of Non-EEA migrant workers by Local Authority in the Hertfordshire LEP area
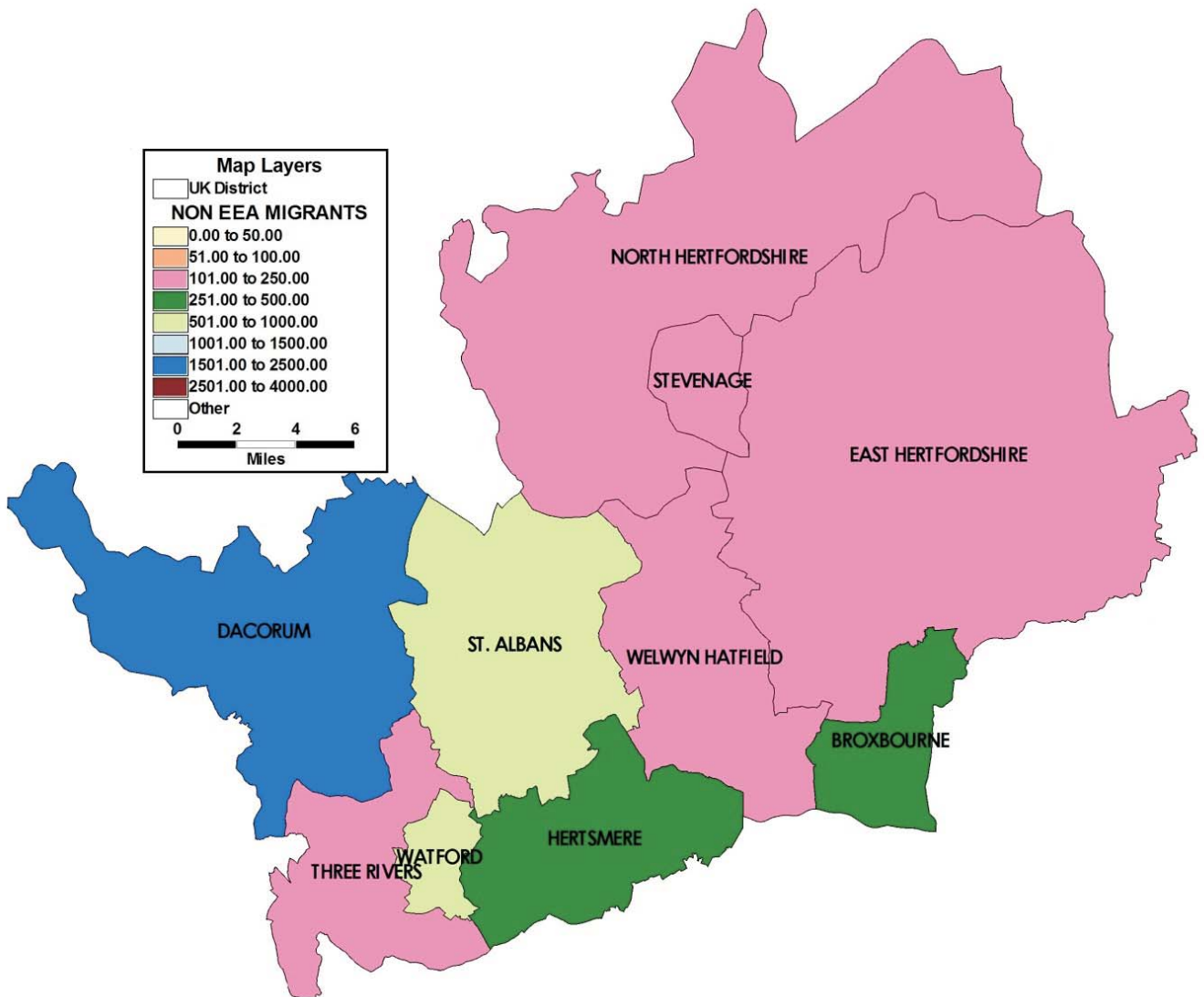

Source: Certificates of Sponsorship, United Kingdom Border Agency

Map 2 presents the distribution of A8 EU migrant workers and reveals that all Local Authorities in the area have witnessed some degree of inward migration. Those with the greatest number of A8 migrant workers are identified as Welwyn Hatfield (390), St Albans (277) Broxbourne (247) and Watford (215). The districts with the fewest number of A8 EU migrant workers are North Hertfordshire (55) and Three Rivers (74).

Map 2: Number of A8 migrant workers by Local Authority in the Hertfordshire LEP area

Data presented in this section demonstrates a significant divergence in the demographic distribution between the two groups of migrant workers. For example, Dacorum appears to have seen few A8 EU migrants but is amongst the highest users of Non-EEA nationals in the Hertfordshire LEP area.

In contrast, both North Hertfordshire and Three Rivers have witnessed very low levels of Non-EEA and A8 worker migration altogether.
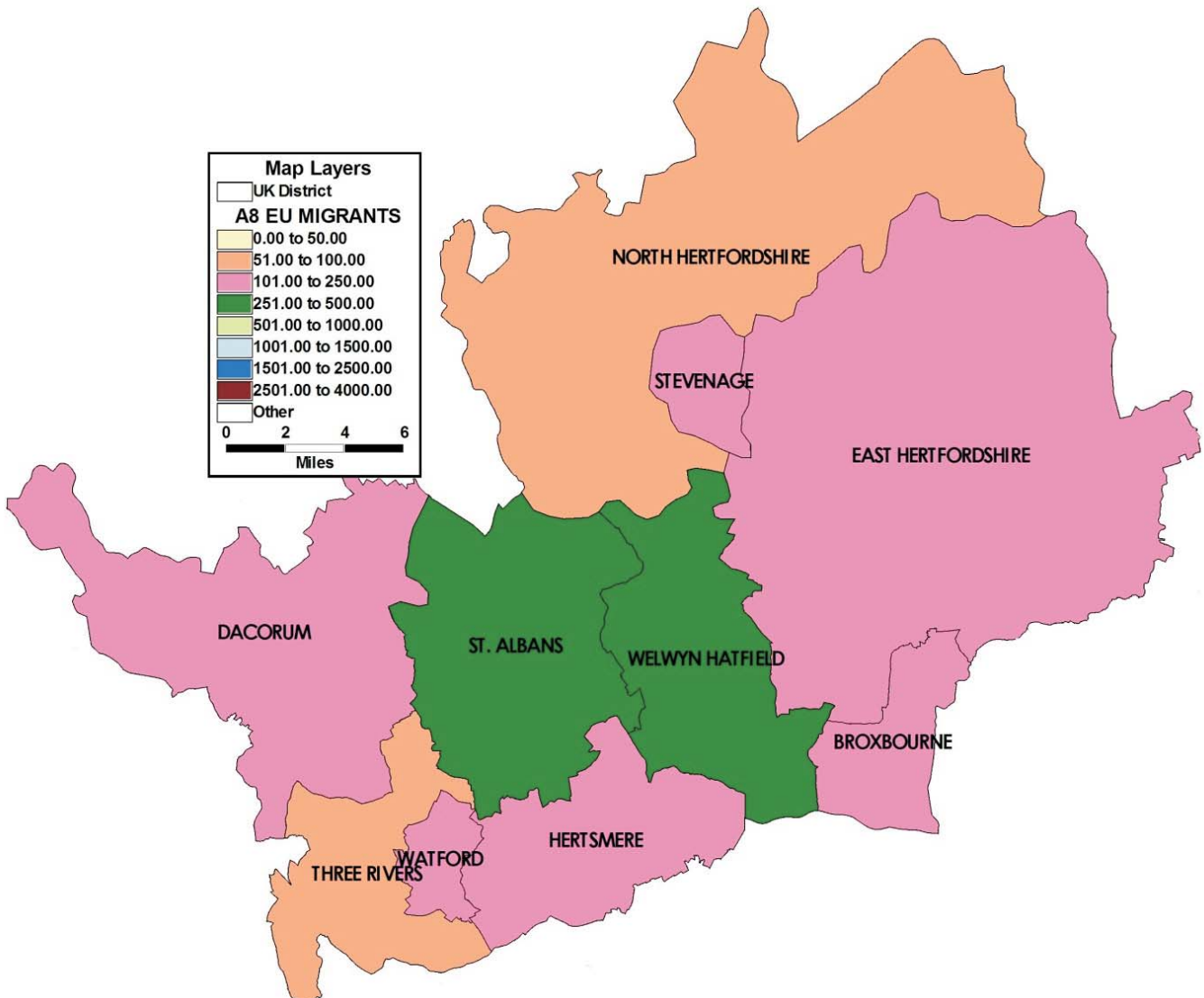
Source: Worker Registration Scheme, United Kingdom Border Agency

Section 8 – Overall Local Reliance

Using DWP data on the number of unemployment claimants looking for work in different occupations, it is possible to assess the capacity of the local economy to absorb the impact of reduced numbers of migrant workers in the future. Table 3 compares the number of migrant workers in each occupation to the number of unemployed people in the Hertfordshire LEP area looking for work in that occupation.

Table 3 demonstrates that only 1 occupation currently employing Non-EEA migrants has a high number of indigenous workers looking to move into the role (Chefs/cooks). Managers, Information and Communication Technology is the only Non-EEA occupation that data suggests has a slight under-supply of local labour. All other top ten occupations suffer from a significant under-supply of indigenous workers. The data, therefore, suggests that companies looking to recruit individuals in these occupations may find it difficult to fill any void generated by a reduced labour supply of Non-EEA migrants in the future.

Table 3 also demonstrates that 9 occupations currently employing A8 migrants also have high numbers of indigenous workers looking to move into these roles, for example, Warehouse Operative; Cleaner/domestic staff; and Sales and Retail Assistants. This indicates that the local economy may be able to adjust relatively easily to a reduced supply of future migrant workers. However, there is no guarantee that the unemployed looking to move into these roles have either the skills or work experience to be a success in these roles, and many may require support to achieve them.

Table 3

Comparison of migrant roles and occupations sought by UK nationals

Non-EEA Top 10 Occupations	Ratio of unemployed to migrants	A8 EU Top 10 Occupations	Ratio of unemployed to migrants
IT/Software Professionals	6.4%	Warehouse Operative	434.8%
Youth & Community Workers	9.1%	Process Operative (Other Factory Worker)	3.8%
Medical Practitioners	1.8%	Cleaner/Domestic Staff	201.8%
Actors/Entertainers	12.6%	Sales & Retail Assistants	2597.5%
Nurses	3.7%	Kitchen & Catering Assistants	491.8%
Chefs/Cooks	108.9%	Waiter/Waitress	162.4%
Clergy	0.0%	Packer	475.6%
Managers, Information & Communication Technology	88.5%	Bar Staff	897.1%
Researchers, Scientific	15.8%	Maid/Room Attendant (Hotel)	1138.5%
IT Strategy & Planning Professionals	52.3%	Chef, Head	450.0%

■ Under supply of local labour compared to migrant labour supply
■ Balance of local labour supply and migrant labour supply
■ Over supply of local labour compared to migrant labour supply

Sources: Worker Registration Scheme, UKBA, & JSA Claimants, Sought Occupations. DWP February 2012.

*Assessing migrant labour reliance in Local
Enterprise Partnerships across the East of England*

The role of Process Operative (Factory Worker) is the only A8 occupation where the number of unemployed indigenous workers looking to move into roles falls substantially below the number of migrant workers currently recruited. This data, therefore, suggests the area may find it difficult to fill any void generated by a reduced labour supply in migrant labour.

Section 9 – Causes of Hard-to-Fill Vacancies

Using data from the National Employer Skills Survey, it is possible to identify the causes of hard-to-fill vacancies amongst occupations which have historically been filled by migrant workers. By understanding the causes of hard-to-fill vacancies amongst indigenous workers, it may be possible for local partners to better direct

resources and effort towards resolving these issues going forward.

The data provides a useful insight into what employers believe to be the main causes of recruitment difficulties amongst occupations which have benefitted from significant numbers of Non-EEA migrant workers. It is clear that skills and experience deficiencies amongst the indigenous workforce are present in many cases. Tackling these skills gaps would therefore be essential if the area had to cope with fewer Non-EEA migrants in the future.

Table 5 below provides data from the National Employer Skills Survey regarding the causes of hard-to-fill vacancies in relation to the top 10 occupations filled by A8 EU migrants.

Table 4

Ranked causes of hard-to-fill vacancies by occupations of Non-EEA migrants

Rank	Occupation	Causes of Hard-to-Fill Vacancies
1	IT/Software Professionals	Low number of applicants with the required **skills** **Lack of work experience** the company demands
2	Youth & Community Workers	Low number of applicants with the required **skills** Job entail shift work/unsociable hours
3	Medical Practitioners	Low number of applicants with the required **skills** **Lack of work experience** the company demands
4	Actors/Entertainers	Not enough people interested in doing this type of job Low number of applicants with the required **skills**
5	Nurses	Low number of applicants with the required **skills** Not enough people interested in doing this type of job
6	Chefs/Cooks	**Lack of work experience** the company requires Job entails shift work/unsocial hours
7	Clergy	**Lack of qualifications** the company demands Low number of applicants with the required **skills**
8	Managers, Information & Communication Technology	**Lack of work experience** the company demands Low number of applicants with the required **skills**
9	Researchers, Scientific	Not enough people interested in doing this type of job **Lack of work experience** the company demands
10	IT Strategy & Planning Professionals	Low number of applicants with the required **skills** **Lack of work experience** the company demands

Sources: National Employer Skills Survey 2007, Learning and Skills Council

Table 5

Ranked causes of hard-to-fill vacancies by occupations of A8 EU migrants

Rank	Occupation	Causes of Hard-to-Fill Vacancies
1	Warehouse Operative	Low number of applicants with the required attitude/motivation Not enough people interested in doing this type of work/job
2	Process Operative (Other Factory Worker)	Not enough people interested in doing this type of work/job **Lack of qualifications** the company demands
3	Cleaner/Domestic Staff	Low number of applicants with the required **skills** Low number of applicants generally
4	Sales & Retail Assistants	Low number of applicants with the required **skills** **Lack of work experience** the company demands
5	Kitchen & Catering Assistants	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation
6	Waiter/Waitress	Job entails shift work/unsocial hours Low number of applicants with the required attitude/motivation
7	Packer	Low number of applicants generally
8	Bar Staff	Job entails shift work/unsociable hours Low number of applicants with the required attitude, motivation or personality
9	Maid/Room Attendant (Hotel)	Not enough people interested in doing this type of work/job Low number of applicants with the required **skills**
10	Chef, Head	Low number of applicants with the required **skills** Not enough people interested in doing this type of job

Sources: National Employer Skills Survey 2007, Learning and Skills Council

Table 5 demonstrates that reasons other than skills, qualifications and work experience account for the majority of hard-to-fill vacancies filled by A8 EU nationals. A lack of interest in available roles or the poor attitude of applicants is often cited as the most common reason for hard-to-fill vacancies.

Tackling these non-skills related causes will clearly be important if UK nationals are going to be persuaded to move into these roles if A8 EU migrant numbers fall in the future.

Section 10 – Local Training Infrastructure

This section provides a top-level overview of the range of learning provision available in the Hertfordshire LEP area relevant to the key occupations filled by both Non-EEA and A8 EU migrant workers. FE data related to FE college provision in the academic year 2010/11 and is based on approximations between Sector Subject Areas and those occupations identified as having the most migrant workers currently employed. Data on HE provision relates to HE providers operating within the Hertfordshire LEP area and is based on an approximation between occupations and JACs[4] codes.

Table 6

Local FE & HE provision[5] by broad occupation

Top 10 Non-EEA Migrant Occupations	Level 2	Level 3	HE	Top 10 A8 EU Migrant Occupations	Level 2	Level 3
IT, Software Professionals	L	L	Y	Warehouse Operative	L	N
Youth & Community Workers	N	L	L	Process Operative (Other Factory Worker)	L	L
Medical Practitioners	N	N	Y	Cleaner/Domestic Staff	Y	L
Actors, Entertainers	L	L	Y	Sales & Retail Assistants	L	L
Nurses	Y	L	Y	Kitchen & Catering Assistants	Y	L
Chefs/Cooks	L	L	N	Waiter/Waitress	Y	L
Clergy	N	L	N	Packer	L	N
Managers, Information & Communication Technology	L	Y	Y	Bar Staff	Y	L
Researchers, Scientific	L	L	L	Maid/Room Attendant (Hotel)	Y	L
IT Strategy & Planning Professionals	L	L	Y	Chef, Head	Y	L

Y = Adequate provision   N= No provision   L = Limited provision

Sources: 2010/11 F05, Individualised Learner Record, Learning & Skills Council & 2010/11 HE Enrolments, Higher Education Statistics Agency

Table 6 shows that in relation to the top 10 roles currently filled by Non-EEA migrants, there appears to be adequate HE provision in 6 of the 10 areas. Only in relation to HE provision relevant to Chefs/Cooks and Clergy is there no apparent relevant provision. While there is some provision it is limited in relation to Youth and Community Workers and Researchers, Scientific.

At FE level there appears to be only adequate provision at Level 3 for those interested in Managers, Information and Communication Technology roles.
Table 6 also provides data on the volume of provision relevant to the 10 roles most commonly filled by A8 EU nationals. The table shows that in almost all areas there is some local FE provision although some is limited in volume. At level 2, 6 out of 10 roles appear to have adequate levels of local provision.

Section 11 – Issues for Consideration

While small as a percentage of the total labour force, this report has demonstrated that migrant workers appear to be supporting the labour market at both ends of the skills spectrum, filling vacancies where there are genuine skills gaps amongst indigenous workers, as well as semi-skilled and unskilled vacancies which UK workers appear to have little interest in applying for.

Both Non-EEA and A8 EU migrant workers have played important parts in a number of sectors in the local economy, including: Computer Programming, Personal Services, Manufacturing, Health Activities and Creative Arts.

Some important local companies have become used to being able to draw in international workers to bolster the domestic workforce and they may well face particular challenges if this source of labour is reduced or eliminated.

[5]Level 2 = GCSE equivalent, Level 3 = A-level equivalent, HE = Any degree level programme

Assessing migrant labour reliance in Local Enterprise Partnerships across the East of England

While all Local Authority areas have seen some inward migration over recent years this has not been evenly distributed and some local areas, such as Dacorum, St Albans and Watford, may face particular shortages as the number of Non-EEA migrant workers reduces. Any future reduction in A8 EU migrants would appear to affect Welwyn Hatfield, St Albans and Broxbourne worst of all.

The government's decision to only consider highly skilled migrant workers with degree level qualifications in the future is likely to cause particular issues for those employers which have historically recruited Non-EEA migrant workers as Chefs/cooks and Care Assistants. While there appears to be significant numbers of indigenous workers looking to work in these roles, there is evidence of both skills and non-skills barriers which have prevented these occupations being filled in the past.

Non-skills related reasons such as "a lack of interest" and "shift working" appear to explain why many employers which now use significant numbers of A8 EU migrants have historically been unable to fill roles from the indigenous population. Tackling these non-skills barriers would seem a clear priority for the future. This is particularly important for those employing Warehouse Operatives who currently employ 376 A8 EU migrants in these roles.

It appears from the top-line analysis of learning provision that there may be a need to increase the number of training places in certain key areas such as: intermediate provision relevant to process manufacturing and hospitality and catering roles.

Many of the issues faced by the Hertfordshire LEP area in terms of key occupations and industries affected by the likely reduction in Non-EEA migrant workers are either the same or similar to those faced by neighbouring areas. It may therefore make sense for partners to discuss these issues with neighbours to see whether there are opportunities for collaborative action.

Appendix 1:
Indicative Migration Estimates (mid 2006 to mid 2010)

LA Name	Local Authority estimates in England and Wales by broad stream					
	Workers	Students	Returning migrants (UK born)	Asylum Seekers	Others	Total
Welwyn Hatfield	3,290	3,990	548	33	1,054	8,914
Three Rivers	642	129	503	14	308	1,597
North Hertfordshire	948	143	725	35	371	2,222
Dacorum	1,518	627	663	46	611	3,465
St. Albans	1,770	272	1,221	12	766	4,040
East Hertfordshire	1,826	305	850	5	673	3,659
Hertsmere	1,622	253	559	30	652	3,114
Stevenage	1,028	218	260	38	298	1,842
Broxbourne	982	104	274	19	323	1,702
Watford	2,878	357	379	71	1,048	4,734

Source: Office of National Statistics

Appendix 2:
Indicative Migration Estimates (mid 2006 to mid 2010) percentages

LA Name	Percentage composition of Local Authority estimates by broad stream (and relative importance with other local authorities)				
	Workers	Students	Returning migrants (UK born)	Asylum Seekers	Others
Welwyn Hatfield	37%	45%	6%	0%	12%
Three Rivers	40%	8%	31%	1%	19%
North Hertfordshire	43%	6%	33%	2%	17%
Dacorum	44%	18%	19%	1%	18%
St. Albans	44%	7%	30%	0%	19%
East Hertfordshire	50%	8%	23%	0%	18%
Hertsmere	52%	8%	18%	1%	21%
Stevenage	56%	12%	14%	2%	16%
Broxbourne	58%	6%	16%	1%	19%
Watford	61%	8%	8%	2%	22%

Source: Office of National Statistics